



Strategies for Staying Afloat

Presented by Kate Jones, JPO
Refugio County



Limit Permissions for New Users

- Master Administrator
- Administrator
- Normal Users



Setting Up Users

- Administration
 - User Profiles
 - General
 - User Type
 - » Normal
 - » Administrator
 - » Master Administrator
 - Permissions
 - Read
 - Add
 - Change
 - Delete

Use Built-in Reminders

- Case Plan Dates
 - Under Supervision tab; enter as due about ten days before the actual due date
- Projected Completion Dates
 - On programs and CSR assessments
- Excel Easy Date Generator
 - Spreadsheet for figuring dates



Check the Data

- Comprehensive Folder Edits are available any time, not just before the extract
- Mid-month CFE for smaller departments
- Weekly CFE for larger ones



Ask Questions

- Never, ever, ever, **ever** be afraid to ask questions!



Keep on Chuggin'!!!

